
Quick Reference Guide:

Beginning of Year Verification and Enrollment Collection

This guide explains the basic process for verifying 2015-16 calendars and enrolling students into schools for the 2015-16 school year.

Topics covered in this Quick Reference Guide include:

- *Verifying 2015-16 Calendars*
- *Summer Transfers & Graduates*
- *2015-16 Enrollments*
- *Records Transfer*
- *Data Verification*
- *Sync Data*



More Information:

[AIM New Users Guide](#)

[Job Corps, MT Youth ChalleNGe, and
MT Digital Academy](#)

[Creating Households](#)

The Beginning of Year Verification establishes calendars and enrollments for the 2015-16 school year. Schools are required to enroll all students in AIM who attend at least one day of class or who receive Special Education services from the district.



Before beginning, consider the following:

1. What data is entered on the Calendar?

- Calendars need a Start and End Date for the District school year, a Calendar Number, the correct grade levels for the school, and the student Start and End Dates. *page 2*

2. How do I properly exit students who transferred over the summer?

- Delete the student's 2015-16 enrollment and update the 2014-15 End Status to reflect the transfer. *page 3*

3. How do I record Summer Graduates?

- Summer graduates are recorded like regular graduates – change the 2014-15 enrollment End Status to *400: Graduated*, and enter *Diploma Date, Diploma Type* and *Diploma Period*. *page 4*

4. How do I get State IDs for new students?

- Obtain State IDs from the student's prior district or from the Student Locator. Districts may upload a Student Demographic file to locate State IDs, however, using the Student Locator reduces the potential for duplication of IDs. *pages 7-8*

5. What are the correct Enrollment Start Status codes for students?

- Start Status codes should accurately reflect the prior enrollment status of the student. *page 9*

6. Which Enrollment Service Type do I choose?

- Service Type indicates level of educational service the student is receiving from the district. *page 9*

7. How do I send/receive a Records Transfer?

- Process requests for records transfers regularly to facilitate the transfer of Special Education records and prevent enrollment overlaps. *page 12*

8. How do I verify the enrollment data I entered?

- The Student Information reports and Ad Hoc Reporting tools can be used to verify data entry. *page 12*

VERIFYING 2015-16 CALENDAR(S)

Choose *Year* 2015-16 and a *School*.

From the **Index**, expand **System Administration** and **Calendar**. Click **Calendar**.

Verify (and/or enter) the district *Start* and *End Dates* (fiscal year is recommended for SPED data entry). Enter "1" in the *Number* field (if you have more than one calendar per school, each school must have a unique number).

Click **Save**.

| Name | Seq |
|------|-----|
| 09 | 10 |
| 10 | 11 |
| 11 | 12 |
| 12 | 13 |

Click the **Grade Levels** tab.

Verify the grade levels listed are valid for that school.

NOTE: Grade levels are determined by the OPI, not by the student's schedule or the district's building configuration. Changes to grade levels in a school must first be approved by the OPI.

Click the **Terms** tab.

Click the name of the *Term Schedule* in the **Term Schedule/Terms Editor** box (*Full Year*). (NOTE: If no term is listed in the box, see next page.)

Under *Term Detail*, enter the student *Start* and *End Date(s)* for the *Term*. Click **Save Term Schedule/Terms**.

The **Periods** and **Days** tabs are optional.

| Name | Sequence | Start Date | End Date |
|------|----------|------------|------------|
| Q1 | 1 | 09/02/2015 | 10/30/2015 |
| Q2 | 2 | 11/02/2015 | 01/15/2016 |
| Q3 | 3 | 01/18/2016 | 03/25/2016 |
| Q4 | 4 | 03/28/2016 | 06/03/2016 |

Auto Create Term Schedules

Parameter Selection

This Schedule Structure has no terms, and this tool will create some for you. Infinite Campus supports multiple term schedules, but only select the term schedules needed for your schedule. Full-year, semester, and quarter long classes can all be created in a quarter term schedule, so those options are mutually exclusive.

☒ Full Year (1 term)
☐ Semesters (2 term)
☐ Trimesters (3 term)
☐ Quarters (4 term)
☐ Other Number of Terms:

Create Terms

If no term is listed in the **Term Schedule/Term Editor**, click **New Term Schedule**.

Select a Term Schedule. Click **Create Terms** (the State requires only Full Year – but if you are using the MT Edition for attendance you may need to enter more information).

Follow the previous instructions to enter *Term* dates.

SUMMER TRANSFERS

Adjust enrollments for students who transferred out during the summer.

Example: Student was enrolled in 2014-15 and was expected to return for 2015-16. A 2015-16 enrollment record was created as part of the end-of-year process. The student moved out of state over the summer, and the school received a records request at the beginning of August.

To correct the enrollment record: Select Year 2014-15 or 2015-16 and the school. Click the **Search** tab and enter the student's last name. Click **Go**.

Year: 15-16 School: Granite High School

Index Search Help

Hendrix, Jenny M

Grade: 10 #816373131 DOB: 06/08/2000 Gender: F

Credit Summary Assessment Behavior Graduation AdHoc Letters Recor

Summary Enrollments Schedule Attendance Flags Grades Tra

Person Summary Report Person Summary Report w/ Picture Print Mailing Label

Person Information

PersonID: 54

Name: Hendrix, Jenny Michelle Nickname:

Gender: F Race/Ethnicity: White State Race/Ethnicity: White Federal Designation: 6:White No Image Available

Birth Date (Age: 15): 06/08/2000 State ID: 816373131

Student Number: 816373131 Person GUID: A8C1C219-B0FD-4805-8684-96F6A2FBC9A4

Comments:

- Modified by: Administrator System 08/25/2015 09:59

Amend the 2014-15 enrollment:

Select the name (appears below the Search Results), then the **Enrollments** tab.

Open the 2014-15 enrollment and change the **End Status** to 180: Transfer to a school out of state.

OPI recommends adding a note in 'End Comments' with the name of the district or school the student transferred to.

Click **Save**.

Delete the 2015-16 enrollment:

Open the 2015-16 enrollment and click **Delete**.

Hendrix, Jenny M

Grade: 10 #816373131 DOB: 06/08/2000 Gender: F

Credit Summary Assessment Behavior Graduation AdHoc Letters Records Transfer

Summary **Enrollments** Schedule Attendance Flags Grades Transcript

Save Delete Print Enrollment History New New Enrollment History

Enrollment Editor

| Edit | Grade | Type | Calendar | Start Date | End Date |
|------|-------|------|---------------------------|------------|------------|
| | 10 | P | 15-16 Granite High School | 09/02/2015 | |
| | 09 | P | 14-15 Granite High School | 09/02/2014 | 05/29/2015 |
| | 08 | P | 13-14 Philipsburg 7-8 | 09/03/2013 | 06/06/2014 |
| | 07 | P | 12-13 Philipsburg 7-8 | 09/04/2012 | 05/31/2013 |

General Enrollment Information

Calendar: 14-15 Granite High School Schedule (read only): Main *Grade: 09 Class Rank Exclude: ☐

*Start Date: 09/02/2014 No Show: ☐ End Date: 05/29/2015 End Action: *Service Type: P: Primary

*Start Status: 04: Transfer from public school in district or state **End Status: 180: Transfer to a school out of state** Dropout Reason: End Comments:

For students enrolled in grades 7-12 only:

If a student did not show up for school as expected in 2015-16 and the district has not received notice or a transfer request, create a one-day enrollment record for 2015-16 in both the district's SIS and in AIM (with *Start AND End Date* the first day of school, *End Status 340: Unknown*). Later, if the district receives notice or a transfer request, change the record as described above for a transfer student.

SUMMER GRADUATES

Adjust enrollments for student who completed graduation requirements after the end of the 2014-15 year, but **prior to** the first day of school in the 2015-16 year. They are counted as Summer Graduates.

Select *Year 2014-15* and a high school. Click the **Search** tab and enter the student's last name. Click **Go**.

Click the **Enrollments** tab. Click to open the 2014-15 enrollment record. Change the *End Status* to **400: Graduated**.

Baggins, Frodo D
#795411894 DOB: 08/04/1998 Gender: M

Credit Summary Assessment Behavior Graduation AdHoc Letters Records Transfer

Summary **Enrollments** Schedule Attendance Flags Grades Transcript

Save Delete Print Enrollment History New New Enrollment History

| Edit | Grade | Type | Calendar | Start Date | End Date |
|------|-------|------|---------------------------|------------|------------|
| | 12 | P | 14-15 Granite High School | 09/02/2014 | 05/29/2015 |
| | 11 | P | 13-14 Granite High School | 09/03/2013 | 08/08/2014 |
| | 10 | P | 12-13 Granite High School | 09/04/2012 | 05/31/2013 |
| | 09 | P | 11-12 Granite High School | 09/05/2011 | 05/31/2012 |

General Enrollment Information

Calendar: 14-15 Granite High School Schedule (read only): Main *Grade: 12 Class Rank Exclude: ☐

*Start Date: 09/02/2014 No Show: ☐ End Date: 05/29/2015 End Action: *Service Type: P: Primary

*Start Status: 02: Continued enrollment same school, no interruption End Status: **400: Graduated** Dropout Reason:

Baggins, Frodo D
#795411894 DOB: 08/04/1998 Gender: M

Summary Enrollments Schedule Attendance Flags Grades Transcript

Credit Summary Assessment Behavior **Graduation** AdHoc Letters Records

Save

The following fields can only be filled out once a student has entered 9th grade:
Date First Entered the 9th Grade
NGA Cohort End Year
NCLB Cohort End Year

State Graduation Record

Earliest Grade 9 Enrollment Information Modified Date: 04/13/2013
Grade 9 Date: 09/06/2011 NCLB Cohort Year: 2015 District Number: 0556 District Name: Phillipsburg K-12 Schools

Enrollment Data: Phillipsburg K-12 Schools (0556)

Graduation Detail: Phillipsburg K-12 Schools (0556)

General Graduation Information

Diploma Date: 05/30/2015
Diploma Type: 01: Regular Diploma
Diploma Period: 03: Four years or with IEP allowing for longer

Date First Entered the 9th Grade: 09/06/2011
NGA Cohort End Year: 2015
NCLB Cohort End Year: 2015
Post Grad Location:
Post Grad Plans:

State Reporting Graduation Fields

Cohort Grad Year:

Click the **Graduation** tab.

Enter the *Diploma Date*, *Diploma Type* and *Diploma Period*.

Click **Save**.

NOTE: The Diploma Period for a student who started grade 9 in the 2010-11 year is *03: Four years or with an IEP allowing for longer* if the student completes graduation requirements prior to the first day of school in the 2015-16 year.

ENTER 2015-16 ENROLLMENTS

If 2015-16 student enrollments were not previously entered during the End of Year - 2014-15 process, enter them now.

There are two ways to enter 2015-16 student enrollments: 1) Direct Entry and 2) File Upload.

The Direct Entry method requires the district to enter enrollments directly into the AIM database. Enrollments can either be rolled from the prior year, entered individually by student using the previous year enrollment, or entered using the Student Locator.

**** It is highly recommended that districts use the **Student Locator** to enroll all new students that do not have a State ID already identified.*

The File Upload Method requires the district to create an upload file, either by extracting data from their existing Student Information System or from an Excel template. The [templates](#) are available on the OPI AIM Webpage.

Direct Entry of Enrollments (Option 1 - Rollover)

One option for direct entry of student enrollments for 2015-16 is to roll the students forward from the prior year. You may have already rolled students forward to 2015-16 during the End of Year Process for 2014-15. If not, the rollover process may still be used unless End Dates for 2014-15 have been entered. (NOTE: Once the End Dates for 2014-15 enrollments are entered, the rollover process will not create 2015-16 enrollments for end-dated students, so it can no longer be used.)

If rollover is your preferred option, see the [End of Year Collection Guide](#) for instructions.

The screenshot shows the 'Enrollment Roll Forward' tool interface. At the top, it states: 'This tool will promote, retain or demote enrolled students into the next calendar and grade.' Below this is a link for 'Show Detailed Instructions'. The interface is divided into several sections: 'Select Source Calendars' with a list of school and grade combinations (e.g., '13-14 Cascade 7-8', '12-13 Cascade High School'); 'Select Source Grades' with checkboxes for grades 01 through 12, and PK, UE, UH, UM; 'Select Start Status' with a dropdown menu set to '01: First time receiving educational services'; '(OPTIONAL) Select Destination Calendar' with a dropdown for 'Select Destination Grade'; 'Select Destination Structure' with a dropdown; 'Start Date Override' with a text field and a note; 'Allow Duplicate Primary Enrollments' with a checkbox; 'Totals Only' with a checked checkbox; 'Show Warnings' with a checkbox; 'Include students whose enrollments end on the last day of the last term' with a checkbox; and 'RUN TEST' and 'RUN' buttons. At the bottom, there is a 'Source Ad Hoc Student Filter' dropdown and a 'Source Service Type' section with checkboxes for 'Primary', 'Partial', and 'Special Ed Services'.

NOTE: If you notice a duplicate student ID, contact OPI to correct the situation.

Direct Entry of Enrollments (Option 2 - Update Last Year's Enrollments)

The second option for direct entry of 2015-16 student enrollments is to use last year's enrollments to create an enrollment in the next year.

Select the 2014-15 year and a school. Click the **Search** tab, select *Student*, and **Advanced Search**.

Under **Student Search**, choose a grade level (e.g., start with 09). Click **Search**.

Select the first student by clicking the student's name. Click the **Enrollments** tab. Change the **Year** to 15-16 and select a school.

Click **New**. Enter the 15-16 *Start Date*, *Start Status*, *Grade Level* (for 15-16) and *Comments* (if applicable). Click **Save**.

(See [Start and End Status and Service Types - Notes](#) on page 9.)

Repeat for all students in this grade level. Start over with prior instructions for the next grade. If a student is moving from one school to another (e.g., from Elementary to Middle School), change the school after selecting the student.

Also:

- **Program Participation data and Aggregate Hours** may also be entered for students during this step. Enter the student's Absent Count on or after the Fall Count Date (October 5, 2015).
- **Sort By** (optional) may be entered at this time. See [Sort By Field - Notes](#) on page 9.

Direct Entry of Enrollments (Option 3 - Student Locator)

The third option for direct entry of 2015-16 student enrollments is to use the **Student Locator**. *This is the preferred method to locate State IDs for students who are new to the district.*

To use the **Student Locator**, set the **Year** to 2015-16 and select the correct school. From the **Index**, expand **Student Information**.

Select **Student Locator**.

The screenshot shows the 'Student Locator' window. At the top, there are dropdowns for 'Year' (set to 15-16) and 'School' (set to Granite High School). Below these are tabs for 'Index', 'Search', and 'Help'. The 'Search' tab is active. On the left is a sidebar menu with 'System Administrator' and 'Student Information' expanded, showing options like General, Program Participation, Health, Medicaid, Special Ed, Student Locator, Reports, Census, Behavior, Health, Attendance, Scheduling, Grading & Standards, Programs, Ad Hoc Reporting, User Communication, and Assessment. The main area is titled 'Student Search' and contains a search form with fields for Last Name, First Name, Gender, Birth Date, Middle Name, SSN #, and State ID. A 'Search-->' button is at the bottom of the form. To the right of the form is a table with columns: Name, State ID, Gender, Birth Date, and %. A single record is visible: 'Haggard, Merle', '736896801', 'M', '06/17/2001', '100'. At the bottom right is a 'Create New Student >' button.

Enter the student's **Last Name**, **First Name** and **Gender**. Click **Search**.

Use the other identifiers (**Name**, **State ID**, **Gender**, **Birth Date** or **%** which is a wildcard search character) to help identify a match. Hover over the record to see information about the student's last enrollment.

See [Student Locator-Notes](#) on Page 8.

This screenshot shows the 'Student Search' form with the following fields populated: Last Name: Haggard, First Name: Merle, Gender: M, Birth Date: 06/17/2001, Middle Name: (empty), SSN #: (empty), State ID: (empty). The 'Search-->' button is highlighted. Below the form is a 'Create New Student >' button.

If the student is located, click the student's name. If the student has never been enrolled in a Montana school, the student name will not appear, so click **Create New Student**. (See [Student Locator](#) - Notes on page 8.)

Enter the **Student Number** (Local ID) – if assigned by the district. Enter the **Identity Info** and **Enrollment Detail** (see screenshot on page 8). The fields in red are required.

The screenshot shows the 'Save' form for a new student. It has two main sections: 'Person Info' and 'Identity Info'. 'Person Info' includes 'Student Number' (5468) and 'State ID' (Pending). 'Identity Info' includes 'Last Name' (Ghandi), 'First Name' (Mohatma), 'Middle Name' (Lee), 'Suffix' (X), 'Gender' (Male), 'Birth Date' (12/27/1998), and 'Soc Sec Number' (XXX-XX-XXXX). The 'Race/Ethnicity' section has a dropdown for 'N: No' and a list of checkboxes for 'Is the individual from one or more of these races?': American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, and White (checked). There is a 'No Image Available' message. The form is titled 'Save' at the top left.

NOTE: Early Kindergarten Entries

MCA 20-7-117 requires that students who have not reached age 5 on or before September 10 of the current school year must have special permission from the School Board to be enrolled in a regular Kindergarten program and counted for ANB. This applies anytime during the year.

For Kindergarten enrollment under 5, please add the Board Approval Date in the Start Comments box on the student's enrollment tab.

General Enrollment Information

*Calendar: 15-16 Phillipsburg School

*Schedule: Main

*Grade: KF

Class Rank Exclude: ☐

*Start Date: 09/02/2015

No Show: ☐

End Date:

End Action:

*Start Status: 09: Transfer from home school within the state

End Status:

Dropout Reason:

Start Comments: Board Approval at 08/12/15 Meeting

End Comments:

Student Records Transfer

Request a Records Release

This is a Records Release containing the student information, the requesting district/user and the releasing district/user.

Student:

Last Name: Haggard

First Name: Merle

Middle Name:

Gender: M

Birthdate: 06/17/2001

SSN:

Grade: 10

School: 14-15 Granite High School

Start Date: 08/27/2014

Enrollment Type: Primary

Requesting District & User

District: 0556 Phillipsburg K-12 Schools

Name: System Administrator

Username: support

Request Date: 08/07/2014

Work Phone:

Email:

Comments:

Submit Request

If the student was previously enrolled in another MT district and not previously enrolled in this district, a **Student Records Transfer** request will automatically appear.

When using your personal log-in, your name and phone number (if entered on the **Demographics** tab) will appear under **Requesting District & User**. Enter comments if necessary.

Click **Submit Request**.

Student Locator - Notes

[\(Click to return to text\)](#)

A student who has an existing State ID may not show as a match in the **Student Locator** for a variety of reasons:

- Nickname versus full name (e.g., Jonathan-Johnny, Michael-Mike, Elizabeth-Liz or Beth or Libby)
- Transposed First Name/Last Name or Gender

Try a variety of options before creating a new State ID.

NOTE: If you know a student has an existing State ID but are unable to find the ID using the **Student Locator**, call the student's prior district or the **OPI AIM Helpdesk** at 1-877-424-6681.

Sort By Field - Notes

[\(Click to return to text\)](#)

The **Sort By** field appears at the bottom of the Enrollment tab screen for a student's enrollment record. Entering data into the **Sort By** field is optional.

The **Sort By** field is an additional identifier used for sorting test booklet labels (either ELP or CRT). Districts may enter any label in the **Sort By** field, such as teacher name, team name, room number, or any other sort option desired. Test labels for CRT or ELP will be sorted first by *District*, then *School*, then *Grade*, then *Sort By* field (if entered).

If you intend to use the Sort by label, it is recommended to enter the field during the enrollment process.

Start Status and Service Types - Notes

[\(Click to return to text\)](#)

Start Status codes should accurately reflect the last active enrollment of a student. A complete list of codes is defined in [Appendix A](#). A few common examples include:

- Student was previously enrolled in a home school - **Start Status** is *09: Transfer from a home school in state*.
- Student was previously enrolled in a private school in another state - **Start Status** is *06: Transfer from an out of state school*.
- Use **Start Status 01: First time receiving educational services** only if the student was never enrolled in any type of school. Kindergarten students are always *01: First time receiving educational services*, unless they were enrolled in a public school's PK program for Special Education services or they are repeating Kindergarten.

Service Types should accurately reflect the type of service the student is receiving from the school.

P: Primary - Student is enrolled in the school to receive education services

N: Special Ed Only - Student receives Special Education Services (PK students or students concurrently enrolled at a private or home school)

S: Partial (Secondary) - Student is primary enrolled in another school but participates in an accredited educational program at a this school



File Upload of Enrollments (Option 1 - Extract File)

The first option for using the File Upload method is to create an extract file from the district's Student Information System in the *.tsv or *.txt format.

Perform the **Student Demographic** file upload first, followed by the **Enrollment** file upload.

From the **Index**, expand **MT State Reporting**. Select **MT Data Upload**. From **Import Type**, select **Student Demographics**. Under **Work to Perform**, select **Validate and Test File**. Browse for the *.tsv or *.txt file.

Click **Upload**.

THIS STEP IS CRITICALLY IMPORTANT!

Check the **Import Results Summary** for **Errors** and **Warnings**.

- **Errors** MUST be corrected before uploading.
- **Warnings** are messages about potential issues with uploading students – please check these thoroughly and do not load the file until all issues are addressed.
 - If **Warnings** state “No matching student found”, see special instructions on next page before proceeding.
- When all **Errors** have been cleared and **Warnings** checked, change the **Work to Perform** to **Load Partial File**. The **Import Type** should be **Student Demographics**.
- Browse for the file and click **Upload**.

Repeat the process for the Student Enrollment file, choosing **Index**, **MT Data Upload**, and from **Import Type** select **Student Enrollment**.

Warning - No matching student found

If the Warning Detail lists “No matching student found”, AIM will create a new state ID for the student when the Student Demographics file is uploaded.

- Do not upload the Student Demographics file if you think there is already a state ID for this student, to avoid duplication. Instead, check the student locator to identify the ID, or call the AIM Helpdesk at 1-877-424-6681 for assistance.
- (This must be done BEFORE uploading the Student Enrollment file)* If a state ID is needed, upload the Student Demographics file and save the report of new state IDs that AIM generates (instructions below). Use the file of new IDs to upload into the district local SIS, or enter the IDs manually in the localSIS.

To capture the file of new state IDs: When, after uploading the Student Demographics file (page 10), AIM displays the upload status report. The report contains a link to download the file with new IDs. **Click Click Here.**

The report shows the new state IDs. Save the file for future reference, and enter the information in the local SIS. After updating the local SIS, proceed to upload the AIM Enrollment extract (see page 10).

| | | |
|---|---|--------------------------|
| Results: | | |
| File Name: test.txt | | |
| Processing Started Time: Mon Aug 25 13:07:04 CDT 2014. | | |
| Processing Finished Time: Mon Aug 25 13:07:04 CDT 2014. | | |
| Total Time To Process File: 0.577 seconds. | | |
| 0 Records Inserted. | | |
| 0 Records Changed. | | |
| 0 Records Deleted. | | |
| 0 Records No Changes. | | |
| Error Count: 0 | | |
| Warning Count: 2 | | |
| Error Detail: | | |
| Line Number | Error Message | Content |
| No Errors | | |
| Warning Detail: | | |
| Line Number | Warning Message | Content |
| 2 | No matching student found. A new state ID will be generated upon 'Load Partial File'. | SD(0556)null(9991057)Mor |
| 3 | No matching student found. A new state ID will be generated upon 'Load Partial File'. | SD(0556)null(9990065)Pax |

| | | |
|---|---|-------------------------|
| Results: | | |
| File Name: test.txt | | |
| Processing Started Time: Mon Aug 25 13:09:48 CDT 2014. | | |
| Processing Finished Time: Mon Aug 25 13:09:50 CDT 2014. | | |
| Total Time To Process File: 1.357 seconds. | | |
| 2 Records Inserted. | | |
| 0 Records Changed. | | |
| 0 Records Deleted. | | |
| 0 Records No Changes. | | |
| The import has generated 2 new state IDs. These state IDs will now be included on the appropriate extracts. | | |
| Click here to download the Student Demographics file with these new ids. | | |
| Error Count: 0 | | |
| Warning Count: 2 | | |
| Error Detail: | | |
| Line Number | Error Message | Content |
| No Errors | | |
| Warning Detail: | | |
| Line Number | Warning Message | Content |
| 2 | No matching student found. A new state ID will be generated upon 'Load Partial File'. | SD(0556)null(9991057)lu |
| 3 | No matching student found. A new state ID will be generated upon 'Load Partial File'. | SD(0556)null(9990065)P |

| | | | | | | | | | |
|-----------------------|------------|-----------|---------|--------|--------------|---|------------|---|---|
| newStateIDs - Notepad | | | | | | | | | |
| File | Edit | Format | View | Help | | | | | |
| HD | 08/25/2014 | 13:23:11 | MT9.1 | | | | | | |
| SD | 0556 | 367671360 | 9991057 | Moreo | Charles Dean | M | 06/07/1996 | N | N |
| SD | 0556 | 888205549 | 9990065 | Paxini | John Wayne | M | 10/25/1996 | N | N |

File Upload of Enrollments (Option 2 - Excel file)

Another option is to use templates to create an Excel file of enrollment data and convert it to the format needed to upload into AIM. The **Student Enrollment Template** and **Student Demographic Template** are available on the OPI AIM Webpage ([templates](#)). From the AIM Webpage, save the **Student Demographic Template** and **Student Enrollment Template**.

Open the **Student Demographic Template**. Enter the required information (shown in red) for each student.

Delete the first three rows of the file and save as a *.tsv or *.txt file. Open the *.tsv or *.txt file and insert a header row (HD *tab* date *tab* time *tab* MT9.1). Save the file.

Follow the instructions to upload the file (see Option 1 above).

| | | | |
|----|------------|-----------|----------------------------|
| No | 08/01/2011 | 15:48:21 | MT9.1 |
| SD | 0280 | 119459608 | 50 Paisley Brad |
| SD | 0280 | 125662052 | 68 Yearwood Trisha |
| SD | 0280 | 149165791 | 45 Millsap Ronnie |
| SD | 0280 | 166135951 | 64 Williams Hank |
| SD | 0280 | 180735107 | 41 Lynn Loretta |
| SD | 0280 | 188415691 | 55 Seals Dan |
| SD | 0280 | 193009537 | 12 Brooks Garth |
| SD | 0280 | 195299033 | 28 Gill Vince |
| SD | 0280 | 196400321 | 54 Rich Charlie |
| SD | 0280 | 210904318 | 17 Carter June |
| SD | 0280 | 212117740 | 67 Judd Wynonna |
| SD | 0280 | 214063709 | 31 Harris Emmylou |
| SD | 0280 | 218199532 | 52 Pickler Kellie |
| SD | 0280 | 223236465 | 37 Krauss Allison |
| SD | 0280 | 240183925 | 70 Brown Zac |
| SD | 0280 | 250939665 | 46 Montgomery John Michael |
| SD | 0280 | 281099467 | 43 McCoy Neal |
| SD | 0280 | 282085655 | 15 Carey Mariah |
| SD | 0280 | 287077795 | 22 Coe David Allen |

Repeat for the **Student Enrollment Template**.

RECORDS TRANSFER

Records transfers are only required for students who have Special Education records in the prior school district. However, it is recommended that districts use the Records Transfer for all students who transfer into the district in order to view student enrollment histories and LEP data.

Huxtable, Theodore
Grade: 10 DOB: 12/01/1998 Gender: M

Summary Enrollments Schedule Attendance Flags Grades Transcript

Credit Summary Assessment Behavior Graduation AdHoc Letters **Records Transfer**

New State Transfer Request

| Request Date | Name | Status | Requesting District | Releasing District |
|--------------|--------------------|---------|------------------------|--------------------|
| 08/07/2014 | Huxtable, Theodore | request | Cascade Public Schools | |

Refer to these guides on the OPI AIM Webpage at [AIM Reference Guides](#)

[Records Transfer](#)

[Records Transfer for AIM Administrators](#)

DATA VERIFICATION

The first step in the data verification process is to make sure the data is correct at the district level! This may involve a dialogue with specific program staff, including the Title I Director, SPED Director, lunch staff, etc.

If the data in the district's local Student Information System (SIS) is incorrect, the data in the AIM MT Edition will likely be incorrect as well.

Once the enrollment data is transferred to AIM (either by direct entry or file upload), there are numerous tools in Infinite Campus to verify data, including the **Student Information Reports** (see instructions on following pages) and the **Ad Hoc Reporting** tool.

The following sections explain how to use these reports to verify data accuracy and completeness.



Index Search Help

System Administrator

▼ Student Information

General

► Program Participation

► Health

Medicaid

► Special Ed

Student Locator

▼ Reports

Caseload Summary

Duplicate IDs

Enrollment Loss Report

Enrollment Overlap

Enrollment Status

Enrollment Summary

File Labels By DOB

Folder Labels by DOB

No Show Report

Process Compliance

Service Detail

Student Information Reports

From the **Index**, expand **Student Information/Reports**.

These reports are useful for verifying enrollment data:

The Student **Enrollment Status** report lists students by name, according to set criteria. You can choose parameters for the report.

Student Enrollment Status

This report lists students' enrollment start/end status and mailing address. The default calendar year is the current selected calendar.

Which students would you like to include in the report?

☒ Grade ☐ Ad Hoc Filter

Which calendar(s) would you like to include in the report?

☒ active year ☐ list by school ☐ list by year

Enrollment Add Date: From To

Enrollment Drop Date: From To

Display Options: ☒ Start Date ☒ End Date

How would you like the report sorted?

☒ Alpha ☐ Grade ☐ Student Number

Which enrollment status would you like to include in the report?

Start Status

End Status

Generate Report

Enrollment Summary Report

This report will list a breakdown of enrollments grouped by school, grade, gender and race/ethnicity. The report can be generated using Federal Race/Ethnicity designations or State Race/Ethnicity values. If your state has many different values for Race/Ethnicity, the Tall report format is recommended. Students with enrollments flagged as "No Show" are not included in this report.

Enrollment Effective Date: 05/11/2014

Which schools would you like to include in the report?

Which Race/Ethnicity values would you like to use?

☒ Federal Race/Ethnicity Values ☐ State Race/Ethnicity Values

How would you like to format the report?

☒ Original Format: Race/Ethnicities across the top and Grade Levels vertically ☐ Tall Format: Grade Levels across the top and Race/Ethnicities vertically

What types of enrollments would you like to include in the report?

☒ P-Primary ☒ S-Partial ☒ N-Special Ed Services

Report Options:

☐ Observe State Exclude (Do not include enrollments marked as state exclude)

☐ Only print Race/Ethnicities in which there is at least one student with that value

☐ Print in HTML format

Generate Report

The **Enrollment Summary** report gives a count of students by *School, Grade, Race/Ethnicity* and *Gender* as of a specific date.

NOTE: If you discover a duplicate student ID, please contact OPI to correct the situation.

Ad Hoc Reporting

The **Ad Hoc Reporting** tool can also be used for data verification. The tool can be used in two ways: 1) Select filters to generate query reports (see our guide, [Ad Hoc Reporting](#); and 2) Select from State Published (i.e., “canned”) reports for checking various requirements to avoid common errors.

Run the State Published reports

Choose a *Year* and *School*. From the **Search** tab, click **Advanced Search**.

Under **Saved Filter** expand the State Published list. *Select* a report and Click **Search**.

The screenshot shows the 'Campus Search' interface. At the top, there are dropdown menus for 'Year' (15-16), 'District' (All Districts), and 'School' (All Schools). Below these are tabs for 'Index', 'Search', and 'Help'. The 'Search' tab is active, and the 'Advanced Search' button is highlighted. On the left, there is a 'Student' dropdown and a 'Search Student' button. On the right, there is a 'Saved Filter' list. The list is expanded to show 'State Published' filters, including 'ADA 2014-15 Days Present > Days Enrolled or >11', 'ADA 2014-15 Missing Days Present or Days Enroll', 'ALL Gifted and Talented 2014-15', 'ALL Homeless at M/V district not McKinney-Vento', 'ALL Homeless Students', 'ALL Homeless that are Unaccompanied', 'ALL Kindergartners with N Service Type', 'ALL Military Connected Missing Military Status', 'ALL Military Connected Students', 'ALL NAEP 4th Grade as of 1/5/15', 'ALL NAEP 8th Grade as of 1/5/15', 'ALL NOT Homeless but has Night Time Residence', 'ALL Preschoolers Not with N Service Type', 'ALL Spec Ed Status - Unlocked IEP Currently', and 'ALL Special Education Medicaid Report'. A 'Search' button is at the bottom right of the filter list.

Naming Key for State Published Ad Hoc Reports

State Published ad hoc reports are named according to the time of year and/or the collection for which they are intended:

ADA = Average Daily Attendance Collections (ADA).

ALL = Can be used any time of year.

BOY = Beginning of Year Collections

CTE = Career and Technical Education Data Collections

EOY = End of Year Collections

FALL = Fall Count Date Collections

LEP = Limited English Proficient

SPRING = Spring Count Date Collections

TW = Testing Window Count Date Collections

All Users should run these State Published Ad Hoc Reports:

ALL Kindergartners with N Service Type - (Be sure to select *Year 15-16*) This report shows kindergartners who have a 2015-16 enrollment with a service type of N, which signifies the student receives special education services only (i.e., no educational services). Most kindergartners (including those with special ed services and those without special ed services) should instead have service type P (primary educational services). This error usually occurs when PK students with N service type are rolled into the new year for enrollment, carrying the N service type along. Review the report and amend the kindergarten student enrollment records as needed to change the N service type to P.

ALL Preschoolers Not with an N Service Type - (Be sure to select *Year 15-16*) This report shows preschool students who have a service type other than N. All preschoolers attending a special education preschool program should have N service type, which signifies they receive special education services only (i.e., no educational services). Review the report and amend the preschool student enrollment records as needed to enter the N service type.

Campus Search

Search for a record being tracked in Campus by using search fields or by selecting a Saved Filter. If you have created a Saved Filter and do not see it in the list, it is likely the Saved Filter was created for a context other than the current (Example: A student filter cannot be applied to a Census Person Search). You may search school-wide.

| Student Search | | Saved Filter | |
|---------------------------------------|----------------------|--|--|
| StateID | <input type="text"/> | <input type="checkbox"/> Special Ed Data | |
| Last Name | <input type="text"/> | <input type="checkbox"/> State Published | |
| First Name | <input type="text"/> | <input type="checkbox"/> Active Students | |
| Student Number | <input type="text"/> | <input type="checkbox"/> ADA 2014-15 Days Present > Days Enrolled or >1 | |
| SSN | <input type="text"/> | <input type="checkbox"/> ADA 2014-15 Missing Days Present or Days Enroll | |
| Grade | <input type="text"/> | <input type="checkbox"/> ALL Gifted and Talented 2014-15 | |
| Birth Date | <input type="text"/> | <input type="checkbox"/> ALL Homeless at MV district not McKinney-Vento | |
| Gender | <input type="text"/> | <input type="checkbox"/> ALL Homeless Students | |
| Person ID | <input type="text"/> | <input type="checkbox"/> ALL Homeless that are Unaccompanied | |
| Locker Number | <input type="text"/> | <input type="checkbox"/> ALL Kindergartners with N Service Type | |
| Special Ed | <input type="text"/> | <input type="checkbox"/> ALL Military Connected Missing Military Status | |
| Status | <input type="text"/> | <input type="checkbox"/> ALL Military Connected Students | |
| Setting | <input type="text"/> | <input type="checkbox"/> ALL NAEP 4th Grade as of 1/5/15 | |
| Disability | <input type="text"/> | <input type="checkbox"/> ALL NAEP 8th Grade as of 1/5/15 | |
| <input type="button" value="Search"/> | | <input type="checkbox"/> ALL NOT Homeless but has Night Time Residence | |
| | | <input type="checkbox"/> ALL Preschoolers Not with N Service Type | |
| | | <input type="checkbox"/> ALL Spec Ed Status - Unlocked IEP Currently | |
| | | <input type="checkbox"/> ALL Special Education Medicaid Report | |
| | | <input type="checkbox"/> ALL Students with N Service Type - Not PK | |

Index Search Help < Batch Resync Selective Sync

System Administrator

- Student Information
- Instruction
- Census
- Behavior
- Health
- Attendance
- Scheduling
- Grading & Standards
- Programs
- Ad Hoc Reporting
 - Filter Designer
 - Data Export
 - Batch Queue
- User Communication
- Assessment
- System Administration
 - Attendance
 - Auditing
 - Batch Queue
 - Calendar
 - Calendar
 - Calendar Wizard
 - School Years
 - Census
 - Custom
 - Data Defining Tools
 - Data Interchange
 - Data Utilities
 - Combine Person
 - Resync State Data
 - Student Records Transfer
 - Deactivated Elements Im
 - Synchronization Field Sett
 - Grading & Standards
 - Health
 - Medicaid
 - Messenger
 - Portal
 - Preferences
 - Resources
 - Special Ed
 - Student
 - Enrollment End Batch
 - Enrollment Roll Forward

| <input checked="" type="checkbox"/> | BehaviorType | 06/17/2014 15:45:51 | Processed: 198 Errors: 0 | <input checked="" type="radio"/> |
|-------------------------------------|-----------------------------|---------------------|--------------------------|----------------------------------|
| <input checked="" type="checkbox"/> | PersonIdentity | 06/17/2014 15:45:51 | Processed: 198 Errors: 0 | <input checked="" type="radio"/> |
| <input type="checkbox"/> | BehaviorType | | | <input type="radio"/> |
| <input type="checkbox"/> | BehaviorResolutionType | | | <input type="radio"/> |
| <input type="checkbox"/> | BehaviorResponseType | | | <input type="radio"/> |
| <input type="checkbox"/> | Behavior | | | <input type="radio"/> |
| <input type="checkbox"/> | CensusContactSummary | | | <input type="radio"/> |
| <input type="checkbox"/> | ContactLog | | | <input type="radio"/> |
| <input type="checkbox"/> | Employment | | | <input type="radio"/> |
| <input type="checkbox"/> | EmploymentAssignment | | | <input type="radio"/> |
| <input type="checkbox"/> | EmploymentBackground | | | <input type="radio"/> |
| <input type="checkbox"/> | EmploymentCredential | | | <input type="radio"/> |
| <input checked="" type="checkbox"/> | Enrollment | 06/17/2014 15:45:51 | Processed: 181 Errors: 0 | <input checked="" type="radio"/> |
| <input type="checkbox"/> | Graduation | | | <input type="radio"/> |
| <input type="checkbox"/> | Roster | | | <input type="radio"/> |
| <input type="checkbox"/> | AttendanceMTSnapshot | 01/17/2014 08:42:29 | Processed: 181 Errors: 0 | <input checked="" type="radio"/> |
| <input type="checkbox"/> | Evaluation | | | <input type="radio"/> |
| <input type="checkbox"/> | Form | | | <input type="radio"/> |
| <input type="checkbox"/> | HealthScreening | | | <input type="radio"/> |
| <input type="checkbox"/> | ImmCertificate | | | <input type="radio"/> |
| <input type="checkbox"/> | LEP | | | <input type="radio"/> |
| <input type="checkbox"/> | LepService | | | <input type="radio"/> |
| <input type="checkbox"/> | LepAccommodation | | | <input type="radio"/> |
| <input type="checkbox"/> | MedicalInsurance | | | <input type="radio"/> |
| <input type="checkbox"/> | POSEligibility | | | <input type="radio"/> |
| <input type="checkbox"/> | ProgramParticipation | | | <input type="radio"/> |
| <input type="checkbox"/> | PublishedTabCustomStudent | | | <input type="radio"/> |
| <input type="checkbox"/> | TeamMember | | | <input type="radio"/> |
| <input type="checkbox"/> | Plan | | | <input type="radio"/> |
| <input type="checkbox"/> | PlanProgressReport | | | <input type="radio"/> |
| <input type="checkbox"/> | Test | | | <input type="radio"/> |
| <input type="checkbox"/> | TestScore | | | <input type="radio"/> |
| <input type="checkbox"/> | TranscriptCourseSE | | | <input type="radio"/> |
| <input type="checkbox"/> | VaccineShot | | | <input type="radio"/> |
| <input type="checkbox"/> | PersonIdentityNoStateIDOnly | | | <input type="radio"/> |

Send Resync

RESYNC DATA

A data sync is required for all file uploads. It is recommended to sync data before collection due dates.

This process syncs the data from Montana Edition and District Edition schools to the State for use in state reporting.

From the **Index**, expand **System Administration/Data**

Utilities/Resync State Data. If syncing data from the 2015-16 year, set the *Year* to 2015-16. If syncing data from the 2014-15 year, set the *Year* to 2014-15.

To sync **Enrollments** check the box for *Enrollment*. All connected data elements will automatically populate. At the bottom,

click **Send Resync**.

The green radio buttons indicate a successful resync of data, and a message will appear in the **Process Inbox**.

| | | | | |
|--------------------------|----------------------|---------------------|--------------------------|----------------------------------|
| <input type="checkbox"/> | EmploymentCredential | | | |
| <input type="checkbox"/> | Enrollment | 08/11/2014 12:25:33 | Processed: 184 Errors: 0 | <input checked="" type="radio"/> |
| <input type="checkbox"/> | Graduation | | | |
| <input type="checkbox"/> | Roster | | | |

Year 15-16 School Granite High School

Index Search Help Enrollment Verification Report

System Administrator

▼ Student Information

General

► Program Participation

► Health

Medicaid

► Special Ed

Student Locator

▼ Reports

Caseload Summary

Duplicate IDs

Enrollment Loss Report

Enrollment Overlap

Enrollment Status

Enrollment Summary

File Labels By DOB

Folder Labels by DOB

No Show Report

Process Compliance

Service Detail

Service Provider Detail

Service Provider Summary

Service Summary

State Enrollment Verification

Graduation Cohort Validations

Test Accommodations (default)

Test Results

► Census

► Behavior

► Health

► Attendance

► Scheduling

► Grading & Standards

► Programs

► Ad Hoc Reporting

► User Communication

► Assessment

This report will communicate with the state edition server to compare local enrollments with the data that exists at the state, it will then generate a report that summarizes any differences.

Select Which Enrollments To Include

Selected School Year 2016

Schools

All Schools
Granite High School
Phillipsburg 7-8
Phillipsburg School

State Grade

All Students
KF
KH
P1
PK
01

Exclude Enrollments Matching Any Of These Additional Criteria

Calendar Excluded ☒

No Show ☐

State Excluded ☒

State Exclude Grade Levels ☒

State Unmapped Grade Levels ☒

Select The Enrollment Fields To Compare Between District And State Edition

☒ State Grade Level ☒ Service Type

☒ Start Date ☒ End Date

☒ Start Status ☒ End Status

☒ Schedule ☒ No Show (if included)

☒ Next Calendar ☒ Next Schedule

☒ Next State Grade Level ☒ End Action

Report Display Options

Show Summary Totals ☒

Show Enrollments Missing At State ☒

Identify students missing at state due to overlap prevention ☒

Show Enrollments Missing At District ☒

Show Enrollments With A Field Difference ☒

Show Value At District And State Of Each Difference ☒

Generate Report

Enrollment Verification Report

After syncing enrollment data to the State, run the Enrollment Verification Report to check for differences between data entered in the MT Edition application and data that has synced to the State.

From the **Index**, expand **Student Information/Reports**. Select **State Enrollment Verification**.

There are a number of options and fields to choose from. Choose the items you want to see in order to verify, and

Click **Generate Report**.

This report will show you differences between the District and the State. Attempt to fix any errors and perform another Resync.

If differences do not resolve or you need further assistance, contact the OPI AIM Helpdesk as noted below.

OPI AIM Helpdesk at 1-877-424-6681 or

opiainhelp@mt.gov